

NAME OF INSTITUTION: ADDRESS: CONTACT PERSON: TITLE: _____ TELEPHONE NO: _____	
SUPERIOR COURT OF CALIFORNIA, COUNTY OF STREET ADDRESS: MAILING ADDRESS: CITY AND ZIP CODE: BRANCH NAME:	
<input type="checkbox"/> GUARDIANSHIP <input type="checkbox"/> CONSERVATORSHIP OF (Name): <div style="text-align: right;"><input type="checkbox"/> MINOR <input type="checkbox"/> CONSERVATEE</div>	
NOTICE OF TAKING POSSESSION OR CONTROL OF AN ASSET OF MINOR OR CONSERVATEE	CASE NUMBER:

NO FILING FEE

NOTE TO INSTITUTION

When a guardian or conservator of the estate of a person takes possession or control of an asset of that person held or controlled by an institution, Probate Code section 2890 requires the institution to file a statement with the court having jurisdiction over the guardianship or conservatorship and identified in the Letters of Guardianship or Letters of Conservatorship. The statement must contain the information specified below concerning the institution, the minor or conservatee, and the asset. The statement must be on this form and must be signed by an authorized officer of the institution.

An "institution" is an insurance company, broker, or agent, an investment company, an investment bank, a security broker-dealer, an investment advisor, a financial planner, a financial advisor, or any other person other than a financial institution. Taking possession or control of an asset includes changing title to the asset, withdrawing all or any portion of the asset, or transferring all or any portion of the asset from the institution.

1. Personal information

- a. Minor or conservatee (*name*):
- b. Guardian or conservator of the estate (*name each*):

2. Institution information

- a. Institution (*name and type*):
- b. Address:

3. Asset information

- a. Account, policy, or other identification number:
- b. Type of asset:
- c. Value or, if it is not known, the estimated value of the asset on the date Letters of Guardianship or Conservatorship were issued by the court to the guardian or conservator (*this information must be given to the extent it is routinely provided in statements from the institution to asset owners*):

4. The guardian or conservator presented Letters of Guardianship or Letters of Conservatorship that identify the guardian or conservator as the guardian or conservator of the estate of the person named above in item 1a.

5. I am an officer of the institution identified in this statement, and I am authorized to sign this statement on its behalf.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date:

(TYPE OR PRINT NAME)

(AUTHORIZED SIGNATURE)

Title:

Telephone no.: